

Message Text

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SUBJ: GLOBAL MARKET RESEARCH: ELECTRIC ENERGY SYSTEMS-
COLOMBIA

REF: (A) USDOC 15944; (B) BOGOTA A-66 JUNE 9, 1975

1) IN THE COURSE OF THE VARIOUS MARKET SURVEYS WHICH HAVE BEEN UNDERTAKEN BY THE MARKET ANALYSIS UNIT (MAU) AT THIS POST, TWO MAINIZIFFICULTIES HAVE BEEN ENCOUNTERED: THE LACK OF PRODUCTION STATISTICS AND THE RELUCTANCE OF FIRMS TO DISCLOSE INFORMATION ABOUT THEIR SALES OR MARKET POSITIONS. ON SEVERAL OCCASIONS, WHEN THE NUMBER OF PRODUCTS INVOLVED IN THE SURVEY IS VERY SMALL AND THERE IS NO STRONG COMPETITION, IT HAS BEEN POSSIBLE TO DEVELOP MEANINGFUL ESTIMATES FOR THESE AREAS THROUGH VARIOUS RESEARCH METHODS. HOWEVER, IT WOULD BE EXTREMELY COSTLY AND TIME CONSUMING TO DEVELOP SALES AND SHARE OF THE MARKET DATA FOR THE DIFFERENT FIRMS COMPETING IN A LARGE SECTOR INVOLVING MANY PRODUCTS. THIS WAS THE CASE ENCOUNTERED WHEN CONDUCTING THE G.M.S. ON ENERGY SYSTEMS. WE WERE CONSCIOUS OF THIS PROBLEM AND DURING THE COURSE OF THE FIRST INTERVIEWS TRIED TO DETERMINE IF IT COULD BE RESOLVED.

2) DUE TO THE CHARACTERISTICS OF THIS FIELD, IN WHICH A HIGH PERCENTAGE OF PURCHASES ARE EFFECTED THROUGH PUBLIC TENDERS, THE FIRM COMPETING IN THE MARKET DO NOT UNDERTAKE SURVEYS AT SECTOR LEVEL.

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ACCORDING TO THE SOURCES CONTACTED, COMPANIES ACTIVE

IN THE MARKET TEND TO FOLLOW CLOSELY THOSE IMPORTANT PROJECTS WHICH COULD REPRESENT LARGE SALES AND REMAIN ALERT TO TENDERS. (SALES CANNOT BE STRICTLY PROGRAMMED ON THIS BASIS). SEVERAL FIRMS WHICH WERE INTERVIEWED DURING THE COURSE OF THE STUDY WERE CONTACTED AGAIN IN AN ATTEMPT TO OBTAIN THE REQUIRED INFORMATION. THE GENERAL CONSENSUS WAS THAT THE INFORMATION COULD BE DEVELOPED, BUT THAT IT WOULD TAKE A SUBSTANTIAL PERIOD OF TIME AND A SIGNIFICANT INVESTMENT IN MAN HOURS.

3) ESTIMATES OF BREAKDOWNS OF 1979 SUBTOTALS IN TABLE II, PAGE 159 OF THE REPORT ARE INCLUDED BELOW AS REQUESTED BY PART 2-A.

TABLE 2

COLOMBIA: IMPORTS OF ELECTRIC POWER GENERATION, TRANSMISSION, AND DISTRIBUTION EQUIPMENT (1972, 1973, 1974, 1979) (VALUES IN THOUSANDS OF U. S. DOLLARS)

1979(2)

	\$ 000P/C SHARE	
GENERATING EQUIPMENT		
USA	10,445	43
JAPAN	4,130	17
FRG	3,0	
8 13		
SPAPV	2,672	11
U.K.	972	4
SWITZ.	486	2
SWEDEN	728	3
OTHERS	1,700	7
TOTAL	24,291	100

1979(2)

\$ 000 P/C SHARE

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TRANSMISSION & DISTRIBUTION
EQUIPMENT

USA	11,721	37
FRG	4,435	14
U. K.	3,168	10
SPAIN	2,851	9
JAPAN	2,534	8
BRAZIL	1,901	6

SWEDEN	1,584	5
OTHERS	3,485	11
TOTAL	31,679	100

1079(2)

\$000 P/C SHARE

TOTAL GENERATION TRANSMISSION &
DISTRIBUTION

USA	21,849	39
FRG	7,539	13
JAPAN	6,664	12
SPAIN	5,523	10
U. K.	4,140	8
OTHERS	10,255	18
TOTAL	55,970	100

(2) PROJECTIONS FOR 1979 WERE BASED ON THE ASSUMPTION
THAT IMPORTS OF ELECTRIC ENERGY SYSTEMS EQUIPMENT
AND COMPONENTS WILL INCREASE AT AN ANNUAL RATE OF
10 PERCENT AT CURRENT VALUES AND THAT PRESENT MARKET
CONDITIONS MAINTAIN THEIR TENDENCIES.

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